



CaliforniaVolunteers - Portal User Guide

Version 1.0

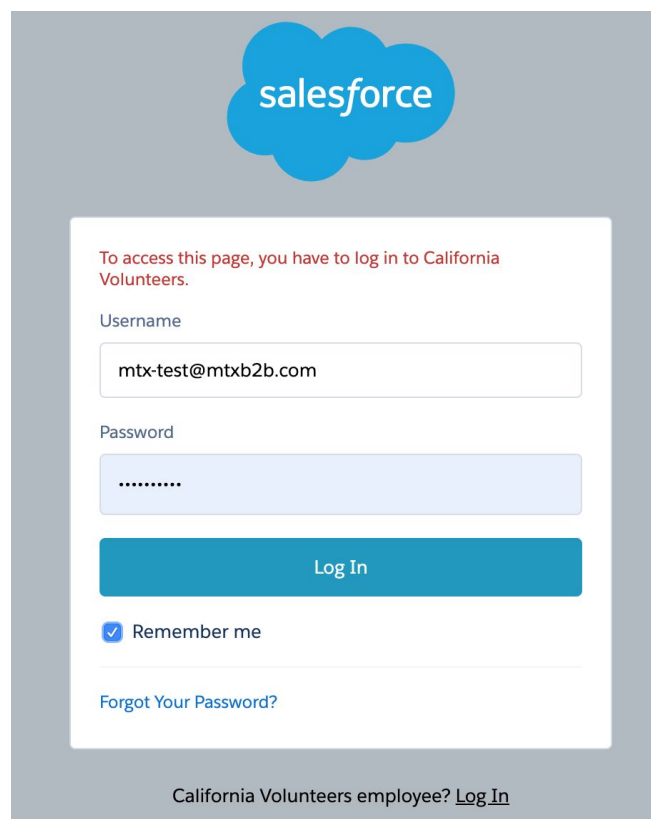
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CaliforniaVolunteers Portal Guide for Sub-grantees

1. Logging into the Portal

1.	Primary Legal Applicants will be invited to log into the portal after the application process. The Primary Legal Applicant will be able to add other Users to collaborate on required information from the Program.
2.	To log into the Portal, please navigate to https://californiavolunteers.force.com/CaliforniaVolunteers/ . It is recommended you bookmark this link for easy access in the future.



The screenshot shows the Salesforce login interface. At the top is the Salesforce logo. Below it, a message states: "To access this page, you have to log in to California Volunteers." The login form includes a "Username" field with the text "mtx-test@mtxb2b.com", a "Password" field with masked characters "*****", and a blue "Log In" button. Below the button is a checked checkbox labeled "Remember me" and a link "Forgot Your Password?". At the bottom, there is a link for "California Volunteers employee? Log In".

3.	Enter your Username and Password and click Log In.
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2. Viewing your Program

1. The Home page will display all of the Programs available to you. Click on the Program you wish to view.



Welcome to the CaliforniaVolunteers Sub-grantee Portal

Programs
All ▾

1 item • Sorted by Program Name • Filtered by all programs • Updated a few seconds ago

Q Search this list...

	PROGRAM NAME ▴	PROGRAM YEAR ▾	FOCUS AREA ▾	FUNDING TYPE ▾	STATUS ▾	RECORD TYPE ▾
1	MTX Program Test	2018-2019	Education;Healthy Futures	Formula	Contracting	New ▾

2. The Program view will show you the information CaliforniaVolunteers currently has on your Program. Updates happen in real time, so you can review your Program's information from CaliforniaVolunteer's perspective.



Program MTX Program Test [+ Follow](#)

Status	Program Year	Program Age	Program Officer	Record Type
Contracting	2018-2019	1	Daluz Gaylord	New


[Program Readiness Flow](#) [Contract Checklist Flow](#) [Progress Report Flow](#) [Program Close-out Flow](#) [New Change Request](#)

▼ Information

Program Name	Solicitation
MTX Program Test	MTX Test Solicitation
Program Year	Status
2018-2019	Contracting
Program Age	Prime Grant Number
1	
Funding Type	Subgrant Number
Formula	
Program Officer	Contract Number
Daluz Gaylord	

3.	Scrolling towards the bottom you can view other information about your Program such as your Performance Measures and Service Locations.
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 Program Roles (1) New			
PROGRAM ROLE ID	ORGANIZATION	CONTACT	ROLE
PR-0004	MTX Test Account	MTX Test Person	Legal Applicant ▼
View All			

 Performance Measures (3)		
PERFORMANCE MEASURE ID	PERFORMANCE MEASURE TITLE	RECORD TYPE
PM-00035		Member Development ▼
PM-00008	MTX Non-Primary PM Test	Non-Primary ▼
PM-00007	MTX Test Primary Performance Measure	Primary ▼
View All		

4.	Clicking on the blue link will allow you to view that information just like your Program's information.
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3. Uploading your Program Readiness Documents

1. The first step in completing all required documentation for CaliforniaVolunteers is the Program Readiness document checklist. To access the Program Readiness flow, please find the corresponding button on your Program.

The screenshot shows the California Volunteers web application. At the top is a search bar and a navigation bar with 'Home' and 'Manage Users' links. Below this, the 'Program' section displays 'MTX Program Test'. A summary row shows: Status: Contracting, Program Year: 2018-2019, Program Age: 1, Program Officer: Daluz Gaylord, and Record Type: New. A row of buttons is visible: 'Program Readiness Flow' (highlighted), 'Contract Checklist Flow', 'Progress Report Flow', 'Program Close-out Flow', and 'New Change Request'.

2. Program Readiness will have all of the required documents for you to upload in terms of Program Readiness. For each row you can upload a document and add notes.

The screenshot shows the 'MTX Program Test' page with the 'Program Readiness Documents' section active. A blue informational box states: 'The Program Readiness Checklist identifies elements of readiness for AmeriCorps program implementation and member management. These reflect the components found in CV's California Program Standards. Some items must be in place prior to starting, while others may be developed in the first year. Resources to assist in developing each item are available on CV's Grantee Central. Contact your Program Officer with any questions.' Below this is a table for document uploads:

DOCUMENT NAME	UPLOADED DOCUME...	STATUS	UPLOAD DOCUMENT	SUB-GRANTEE NOTES	CALIFORNIA VOLUNTEERS NOTES	
Document Title			Upload Files	<input type="text"/>		
Performance Measurement Data Collection and Review Plan			Upload Files	<input type="text"/>		
Member Service Agreement (Contract)			Upload Files	<input type="text"/>		

3.	In the uncommon circumstance that a row does not apply to you (possibly because you covered it in a previous document), you can indicate such in the notes and skip uploading a document.
4.	If you would like to add additional documents, you can add another row by clicking “Add New Document”

Member Enrollment & Exit Process Using eGrants/My AmeriCorps Portal	
--	--

[Add New Document](#)

[Go Back To Program](#)

4.	If you would like to add additional documents, you can add another row by clicking “Add New Document”
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Additional Information...			Upload Files			 
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[Add New Document](#)

5.	You will be able to name it to give context to CaliforniaVolunteers, and notes are recommended for all new documents. You can also delete it by using the delete icon on the right.
6.	If you are not submitting your document as soon as you upload it, it is recommended you click the “Save” icon on the right in order to not lose any comments you created.
7.	To submit your documents, first review to ensure you covered every row. Once you have done that, click on Submit in the bottom right corner of the page.

4. Completing the Contract Checklist

1.	The Contract Checklist process can be done within your Salesforce portal. To begin, click on the Contract Checklist Flow button on your Program.
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Program

MTX Program

+ Follow

Status

Contracting

Program Year

2018-2019

Program Age

1

Program Officer

[Daluz Gaylord](#)

Record Type

New

Program Readiness Flow

Contract Checklist Flow

Progress Report Flow

Program Close-out Flow

New Change Request

2.	Each step of the Contract Checklist needs to be completed by your Program. For each step, complete the required information and click Save and Continue.
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MTX Program - Contract Checklist



Contract Checklist Instructions (Step 1 of 8)

CaliforniaVolunteers (CV) requires that AmeriCorps programs have an executed contract in place prior to enrolling members and incurring costs against the federal (CNCS) share of the budget. AmeriCorps grantees must follow the steps and submit the required documents to enter into a contract with CV. Once the complete contract package is received by CV, it will take up to 30 days to process for contract execution. A contract package is considered "complete" once all required steps are completed and the required documents have passed CV review. Any need for clarification or additional contract documents will delay the execution of your contract.

The contract package consists of the following steps:

1. Program Dates: Identify your program's start and end dates, the start and end dates for member service, and the last date to start each member slot type.
2. Program Description: Provide a brief description of your program, the AmeriCorps members' role, and the qualifications you look for in an AmeriCorps member.
3. Labor Organization Certification: Certify that any relevant labor organizations were consulted as required by law.
4. Tutoring Program Compliance Certification: Certify that your program meets the requirements for tutoring programs as required by law.
5. Confirmed Match Assurance: Identify all sources of match, accounting for the entire Grantee Share of the budget
6. Document Upload: Upload the documents necessary to process your contract.

[Back to Program](#)

[Save](#)

[Save and Continue](#)

3.	Some fields not required you to complete such as all of the Last Date to Enroll fields because you may not have every slot type.
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Last Date to Enroll

The last date to start the member should allow enough time to complete their service hours, allowing for holiday/illness. Calculate dates for all possible slot type in your program design.

For example, If utilizing solely 1700 hours slots, include 900 hr. in case of change in slot types.

1700 Hrs	<input type="text" value="Jun 3, 2019"/>	
1200 Hrs	<input type="text" value="Jun 4, 2019"/>	
900 Hrs	<input type="text" value="Jun 5, 2019"/>	
675 Hrs	<input type="text"/>	
450 Hrs	<input type="text"/>	
300 Hrs	<input type="text"/>	

4.	You will be required to list all of your matched funding sources. You have the option of listing either Cash or In-Kind sources. To add a new source of either variety, click on its corresponding
----	--

	New button above its grid.
--	----------------------------

ment site requirements.
Received. If the subgrantee received matching funds before signing a CV co

New Cash Source

* Source
Source 2

* Source Type
State

* Amount
\$10,000.00

* Evidence Available
Other

Other Specification
Larger agreement through a State Grant

Cancel Submit

5.	You will be required to fill out all necessary details around that Source. If you have an evidence that is not categorized by the options for the Evidence Available field, please select Other and explain with as much detail as possible.
6.	Documents will need to be uploaded, and they follow the same process as described in the Program Readiness section.
7.	Once you have completed all required fields in the Contract Checklist, you will be able to submit for your Program Officer's review by clicking Submit.

Contract Checklist Submission (Step 8 of 8)

Certify your contract package below prior to submission.

☒ I have reviewed the contract materials submitted for MTX Program and certify that all required documents are complete, accurate and in the required CV forms and format. I understand that if any of the above documents are not complete or accurate, my contract will be delayed.

Back to Program

Previous

Save

Submit


5. Completing Progress Reports

1. Progress Reports can be completed within the portal. Once your Program is active, your Progress Report due dates will be indicated on your Program in the Report Periods section.

▼ Reporting Periods

Reporting Period 1 End Date 12/30/2018	Progress Report 1 Due Date 1/14/2019
Reporting Period 2 End Date 4/30/2019	Progress Report 2 Due Date 5/14/2019
Reporting Period 3 End Date 7/30/2019	Progress Report 3 Due Date 8/14/2019
Reporting Period 4 End Date	Progress Report 4 Due Date

2. You can access your Progress Reports from the Program with the Progress Report Flow button.

 Program
MTX Program

+ Follow

Status	Program Year	Program Age	Program Officer	Record Type
Contract Executed	2018-2019	1	Daluz Gaylord	New

[Program Readiness Flow](#) [Contract Checklist Flow](#) [Progress Report Flow](#) [Program Close-out Flow](#) [New Change Request](#)

3. Progress Reports have a different page for each area where you need to provide information. Your Final Progress Report will have two additional pages of information you will be required to fill out.

MTX Program

1 2 3 4 5 6

Sep 30, 2018 - Apr 30, 2019 (Progress Report 2)

Member Enrollment, Retention, Exit (Step 1 of 6)

Please complete all required fields on the form below.

Enrollment %	<input type="text" value="100"/>
Retention %	<input type="text" value="100"/>
# Of members enrolled past 5 days	<input type="text" value="0"/>
# Of members exited past 30 days	<input type="text" value="0"/>

4. Progress Reports sections provide all the tools you need to accurately complete your Progress Report. You can emphasize text, add formatting, and even images if they would be helpful.

Retention Explanation:

If the program is not able to retain all of its member, provide an explanation and describe your plan for improvement. While CV recognizes retention rates may vary among effective program depending on the program model, the expectation is that grantees pursue the highest retention rate possible.

1

Salesforce Sans 12 B I U

Rich text fields allow you to really customize your response:

1. Add as much detail as you need
2. Emphasize for effect

[Add links if you think they are needed](#) Or images:

5. You will recognize all of the Performance Measures you had put forth as you were applying for your Program. You will be able to easily report on each of the Performance Measures and Targets you put forth.

Performance Measures (Step 2 of 8)

Please complete all required fields on the form below.

▼ Primary Performance Measures

▼ [MTX Test Primary Performance Measure](#)

Target	Statement	NPM Code	Anticipated	Actual
Output		ED6	300	<input type="text"/>
Outcome		ED8	100	<input type="text"/>

6. When complete, attest to the accuracy of the Progress Report and click Submit to send it to your Program Officer.

Progress Report Submission (Step 8 of 8)

Please complete all required fields on the form below.

- ☒ By Submitting this Final progress report, I attest that all information reported is truthful and accurate.
- ☒ This report includes data for the current program year only, and all data is directly attributable to program activities.
- ☒ I attest that the data reported has been validated for completeness, consistency, and accuracy, and that source documentation is retained.

[Back to Program](#)[Previous](#)[Save](#)[Submit](#)

- | | |
|----|--|
| 7. | Your Program Officer will review, and if revisions are needed they will reject your Progress Report and provide comments on the page where information needs correction. |
|----|--|

6. Creating and Submitting Change Requests

1. Change Requests are now handled through the portal. To create a new Change Request, find the New Change Request button, choose the Change Request type you would like to make, and click Continue.

Select Record Type

Select a record type :

- ☐ Budget Amendment
- ☒ Slot Conversion
- ☐ Match Partner Change
- ☐ Program Date Changes
- ☐ Performance Measurement Change
- ☐ Other Programmatic Change

Cancel Continue

2. The information required to submit will differ based on each Program. Each Change Request type will provide its own instruction on how to complete it.

Change Request CR-0013 [+ Follow](#) [Submit for Approval](#) [Edit](#)

Record Type: Slot Conversion Program: [MTX Program](#) PO Approval: ☐

Approval History (0)

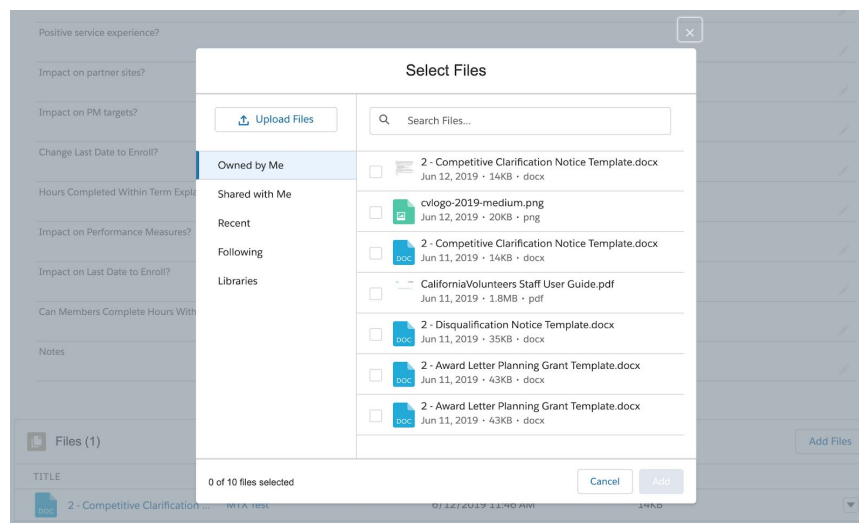
CV requires pre-approval of all slot-type changes before any changes are made in eGrants. Please answer each question succinctly and submit the request for approval. You are encouraged to discuss the request with your Program Officer prior to submittal. Please submit your Member Slot Conversion Request at least 7 days prior to the proposed conversion date and allow up to 30 days for CV approval. Upon CV approval of your request, you will then need to complete the conversion in Egrants. A tutorial on how to do so can be found [here \(Click and then see the Slots Management section\)](#). You can also contact the eGrants help desk for further assistance if needed.

Important-Please remember the following restrictions on slots:

- If your request includes previously filled slots, remember that if an exiting member qualifies for a partial Education Award (a compelling circumstance exit having served 15% or more of hours) or has served more than 30% of hours, the slot cannot be refilled or converted (see CNCS FAQs D.4.)

<p>Change Request ID CR-0013</p> <p>Record Type Slot Conversion</p> <p>Partner Reviewed Attestation <input type="checkbox"/></p> <p>Document Upload: Program Diagram <input type="checkbox"/></p> <p>Document Upload: Budget <input type="checkbox"/></p> <p>Slots available to convert in eGrants <input type="checkbox"/></p>	<p>Status Draft</p> <p>Program MTX Program</p> <p>PO Approval <input type="checkbox"/></p> <p>Trust Neutral Calculation <input checked="" type="checkbox"/></p> <p>Stakeholders have reviewed this request <input type="checkbox"/></p>
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3.	All of the fields available for you to edit are usually required. Some Change Requests require uploaded files, which can be done at the bottom of the page. Find the section titled Files and click on New.
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4.	If you have not previously uploaded the file, do so by clicking on the Upload Files button.
5.	Some Change Request types, such as a Slot Conversion, do not require you to enter values for Slots that you are not changing to. The system will not allow you to submit a Change Request without all of the required fields. If you see the error message below, it means you missed a field.

CV requires pre-approval of all slot-type changes before any changes are made in eGrants. Please answer each question succinctly and submit the request for approval. You are encouraged to discuss the request with your Program Officer prior to submittal. Please submit your Member Slot Conversion Request at least 7 days prior to the proposed conversion date and allow up to 30 days for CV approval. Upon CV approval of your request, you will then need to complete the conversion in Egrants. A tutorial on how to do this can be found [here](#) (Click and then see the Slots Management section). You can also contact the eGrants help desk for further assistance if needed.

Important-Please remember the following restrictions on slots:

- If your request includes previously filled slots (more than 15% or more of hours) or has served as a compelling circumstance exit having served

No applicable approval process was found.

Change Request ID: _____ Status: _____

6.	To submit a Change Request, find the Submit for Approval button at the top of the page. Click on it, and then add comments if you think they are needed.
----	--

[+ Follow](#)
[Submit for Approval](#)
[Edit](#)


✕

Submit for Approval

Comments

[Cancel](#)
[Submit](#)


- | | |
|----|---|
| 7. | Once you have submitted your Change Request, you can see the Approval History at the top of the record page. Your Program Officer will be notified of the Change Request right away, and will review and either Approve or Reject it. |
|----|---|

<div>  Approval History (2) Recall </div>			
STEP NAME	DATE	STATUS	ASSIGNED TO
Program Officer Approval	6/12/2019 10:30 AM	Pending	Daluz Gaylord ▼
Approval Request Submitted	6/12/2019 10:30 AM	Submitted	MTX Test ▼
View All			

- | | |
|----|--|
| 8. | You will be notified via email of the status of your Change Request. If you have any further questions, please reach out to your Program Officer directly. |
|----|--|

7. Uploading Miscellaneous Files

1.	You can always upload a file to Salesforce instead of emailing it where it can be easily lost. To do so, on your Program page navigate to the bottom Files section.
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 Files (0)

Add Files

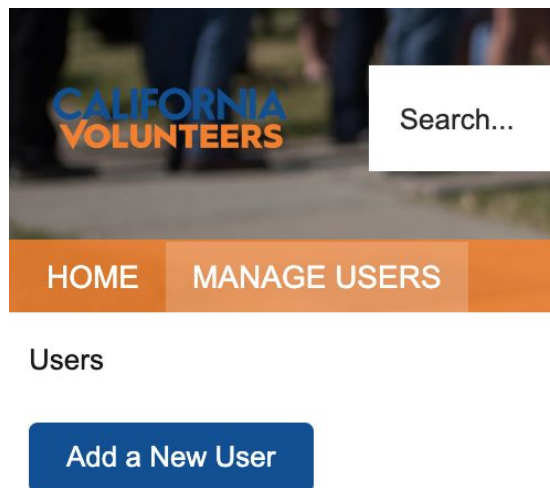
Upload Files

Or drop files

2.	Drag and drop any file to upload it right into Salesforce. Your Program Officer will be able to access it in Salesforce.
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8. Managing your Users

1.	As the Primary Legal Applicant for a Program, you are allowed to create other Users to manage your Program.
	All Users have access to all Programs associated with your Organization. If you Organization has multiple Programs then every User you create will be able to see all of the Programs. Please be aware of this before creating Users, and if you have concerns around this please reach out to your Program Officer.
2.	To manage your Users navigate to the Manage Users tab next to the Home tab.



3.	The Manage Users tab shows all of the Users associated with your Account. To add a new User, click on the Add a New User button.
----	--

Create a new User

*First Name

*Last Name

*Email

*Phone

☐ Authorized

Close
Create

4.	You are required to add the First Name, Last Name, Email, and Phone Number of the prospective User. Authorized refers to whether that User is allowed to officially submit on your behalf. Click Create when you are ready to create and notify that User.
	Non-authorized Users can review Program information, fill out details in all of the flows, and create and submit Change Requests, but cannot submit for approval Program Readiness, Contract Checklist, Progress Reports, or the Program Close-out.

HOME

MANAGE USERS

Serving Here

Users

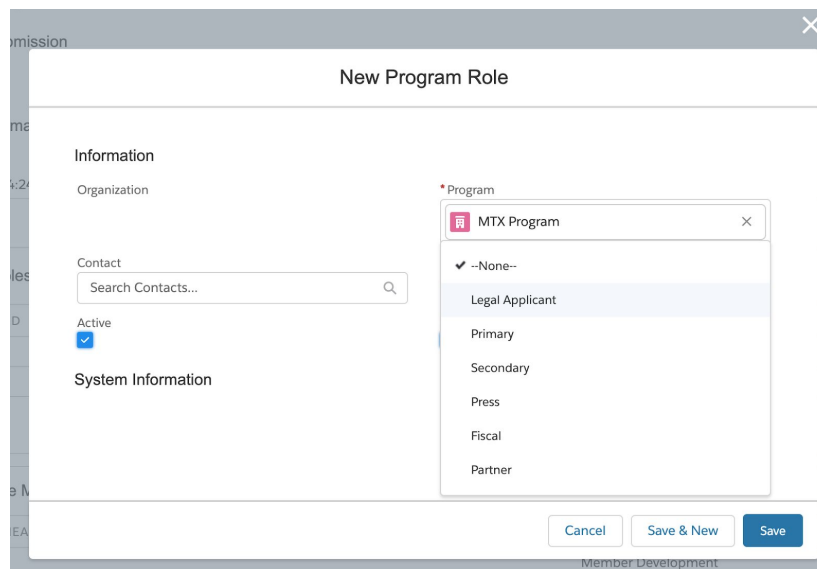
Add a New User

Name ↓	Email	User Since	Permission	Authorized	Status	Action
User Guide Created User	alexander.habiby+userguide@mtxb2b.com	Wednesday, Jun 12, 2019	User	true	Active	Edit

4.	Once created, you can edit a User's information and deactivate them at any time. Only the Primary Legal Applicant can create and manager Users.
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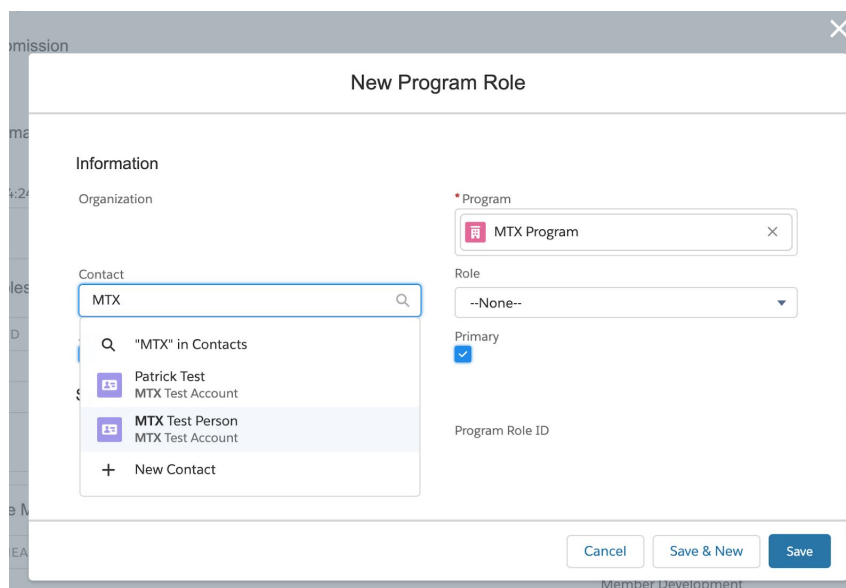
9. Adding a Program Role

1. You can indicate which people do what in your Program, and you can even associate Users you created to access Salesforce. Find the Program Roles section on your Program page and click New.



The screenshot shows the 'New Program Role' form. The 'Program' field is open, displaying a list of roles: --None--, Legal Applicant, Primary, Secondary, Press, Fiscal, and Partner. The 'Legal Applicant' role is currently selected. The form also includes fields for Organization, Contact (with a search bar), Active (checked), and System Information. At the bottom, there are buttons for Cancel, Save & New, and Save.

2. You will be able to indicate what capacity the person serves on your Program by the Role field. You must associate a Program role with a Contact. A Contact is any person that is inside Salesforce (your User is a Contact and is already associated with the Program).



The screenshot shows the 'New Program Role' form. The 'Contact' field is open, displaying a list of search results for 'MTX'. The results include 'Patrick Test MTX Test Account' and 'MTX Test Person MTX Test Account'. The 'MTX Test Person MTX Test Account' is currently selected. The 'Role' field is set to --None-- and the 'Primary' checkbox is checked. The 'Program Role ID' field is empty. At the bottom, there are buttons for Cancel, Save & New, and Save.

3. Search first if the person you are looking for is in the system. If not, you can create a new Contact. You must fill out the information accurately and provide an email or phone for that person. The Account Name for your new Contact is always your Organization.

The screenshot shows a 'New Program Role' form. The 'Information' section includes an 'Organization' field and a 'Contact' dropdown menu. The 'Contact' dropdown is open, showing search results for 'MTX'. The results include 'Patrick Test MTX Test Account', 'MTX Test Person MTX Test Account', and a '+ New Contact' option. The 'Program' field is set to 'MTX Program'. The 'Role' dropdown is set to '--None--'. The 'Primary' checkbox is checked. The 'Program Role ID' field is empty. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

4. Click save on both the new Contact you created (if you created one) and the Program Role to save the Program Role.

The screenshot shows a 'New Contact' form. The 'Contact Information' section includes fields for 'Name' (Salutation, First Name, Middle Name, Last Name, Suffix), 'Account Name' (set to 'MTX Test Account'), 'Phone', 'Extension', 'Email' (set to 'test@test.com'), 'Mobile', 'Fax', and 'Title'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.